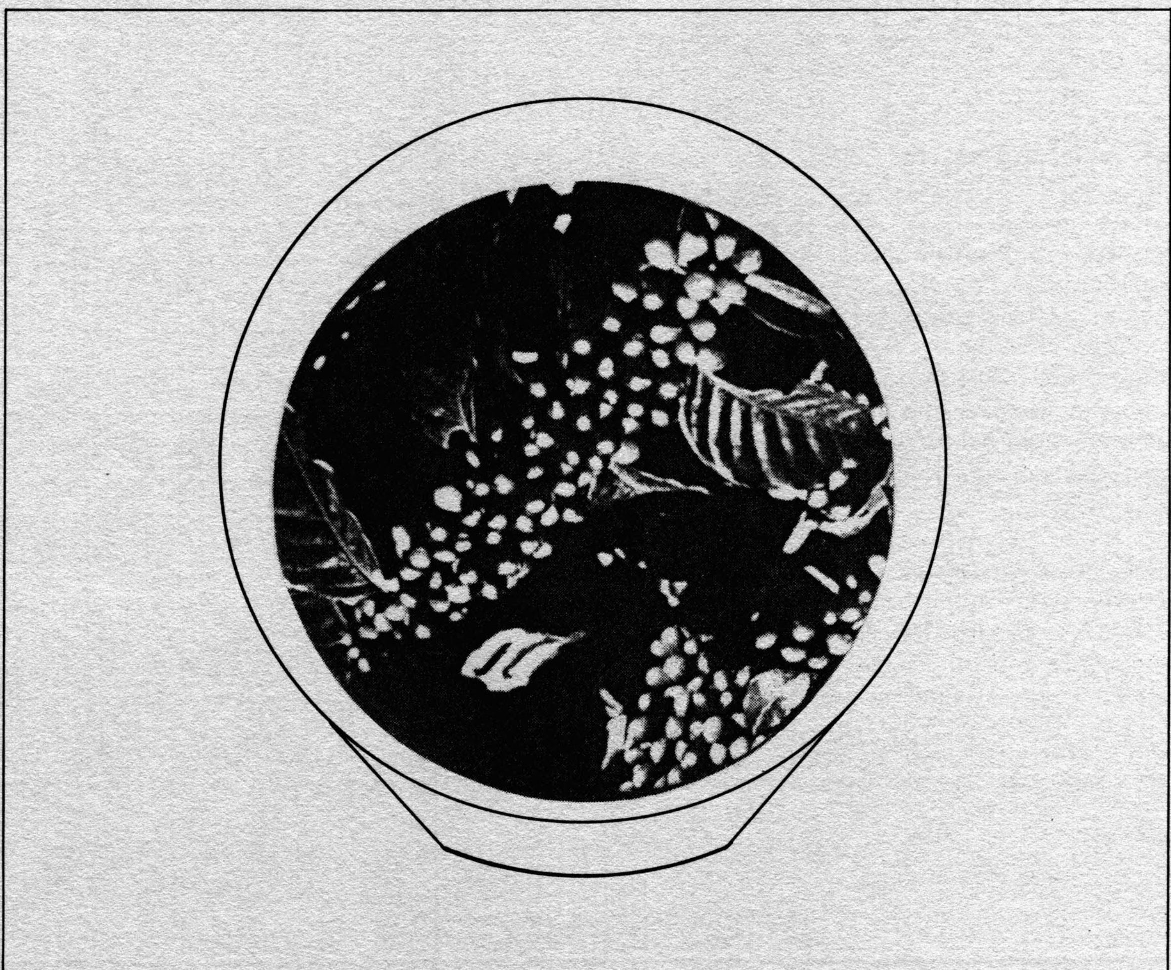
INFORMATION TEXT SERIES 037

Hawaii Institute of Tropical Agriculture and Human Resources
College of Tropical Agriculture and Human Resources, University of Hawaii

THE COFFEE MARKET IN JAPAN

Stuart T. Nakamoto, John M. Halloran, Yuichi Kishimoto, and Hajime Kazumi



THE AUTHORS

Stuart Nakamoto is an associate professor in the Department of Agricultural and Resource Economics, University of Hawaii at Manoa, Honolulu.

John Halloran is an associate professor in the same department.

Yuichi Kishimoto is a professor in the faculty of business at St. Andrews University, Osaka, Japan.

Hajime Kazumi is a graduate assistant in the same faculty.

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INTRODUCTION

This report presents available information on the coffee market in Japan. Data are summarized in the narration or presented in figures and tables in the text and the appendix. All information is from the United Coffee Institute in Tokyo, unless otherwise cited.

JAPAN IN THE WORLD COFFEE MARKET

Japan is the world's fifth-largest importer of coffee and coffee products (Table 1). In the 1985–86 crop year, Japan imported the equivalent of 4.6 million bags (275,000 metric tons) of green coffee,[1] a 10.6 percent increase over the previous year. Only the United States, West Germany, France, and Italy imported more. In 1989, Japan was tied with France as the third-largest consuming nation (McCabe 1989).

More than 88 percent of Japan's imports consisted of green coffee, followed by about 6 percent instant (or soluble) coffee and about 0.2 percent roasted coffee (Figure 1). The remaining 5 percent represents coffee extract or concentrate, used mainly as a flavoring in processed products.

Of the various coffee products, only green coffee has no import tariff. Other coffee products are charged varying rates of up to 35 percent, depending on agreements, trade regulations, and the trading status of the exporting nation with Japan.

Green Coffee

Japan imported 535 million lb of green coffee in 1986, with a value of $1.02 billion (172 billion yen at a conversion rate of 168.5 yen/dollar). Except for recessionary periods, there has been a steady increase in green coffee imports since 1959 (Figure 2 and Table A1). Imports from 1979 to 1987 grew at an annual rate of 5.6 percent, and 1987 imports of 596 million lb were an 11+ percent increase over those for 1986.

Coffee imports have come from 50 countries, encompassing practically all major producing nations (Table A2). Average prices ranged from $1.27/lb to $4.86/lb. Brazil, Colombia, and Indonesia account for the majority of supplies. The market share of these three countries has increased from 53 percent in 1982 to 57–65 percent in the following five years (Table 2).

The highest priced green coffee in 1984–1986 was from the United States, reflecting imports of Kona Coffee (Table 3). Since Jamaica Blue Mountain is generally recognized as having the highest quality and consequently, is the most expensive coffee in the world, the reported figures probably include the lower grades of High Mountain and Prime Washed. Both the U.S. and Jamaican imports were priced much higher than the mean for all imports, indicative of their higher quality.

Other Coffee Products

In addition to the 1986 green coffee imports of $1 billion, Japan also imported $115 million of other coffee products. These consisted of $78 million of instant coffee, $4 million of roasted product, $24 million of sweetened coffee extract, and $8 million of coffee extract without sugar.

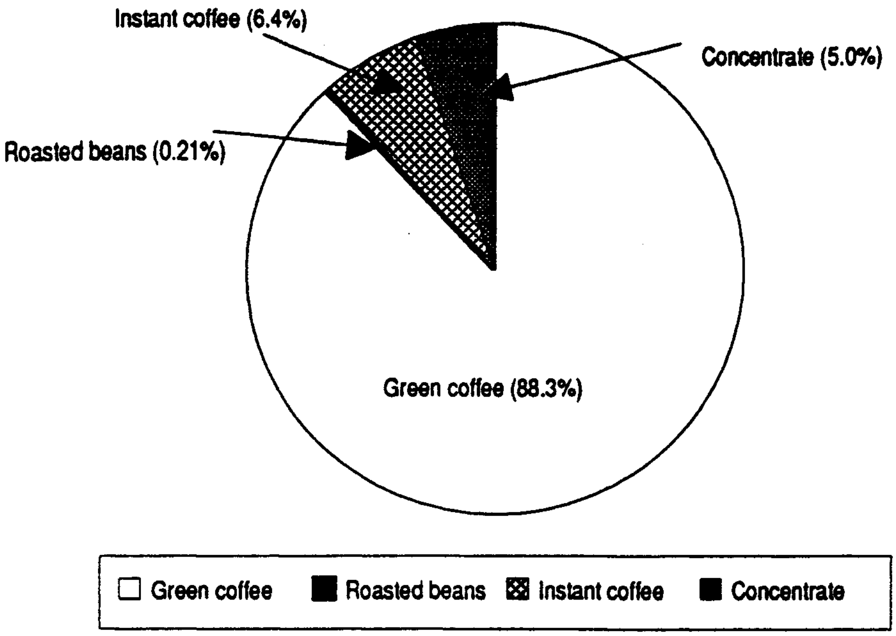
Instant coffee imports peaked strongly in 1979 with a green coffee equivalent of 55.4 million lb, but have declined since then at an annual rate of –2.9 percent (Table A2). Brazil and Colombia

Table 1. Leading importing nations of coffee and coffee products.

Country	1983–84	1984–85	1985–86
	------ Bags (× 1000) ------		
United States	19,629	19,527	21,090
West Germany	9,209	9,006	9,491
France	5,696	5,832	5,477
Italy	3,790	4,497	4,663
Japan	4,287	4,130	4,569
Total	65,527	64,142	66,874

Note: Includes green coffee, roasted beans, instant coffee, and concentrate in green coffee equivalents.

[1] "Green coffee" refers to the commonly traded product form. The pulp is removed from coffee berries (or cherry coffee), and the remaining bean is dried to get parchment coffee. Parchment coffee is further processed to remove the hull from the bean, at which stage the product is called green coffee. Green coffee is then roasted and ground before being brewed to get the final cup of coffee. "Regular coffee" refers to the ground, roasted product, as opposed to instant coffee.



Percentages are in green coffee equivalents.

Figure 1. Coffee import volume to Japan, by type, 1986.

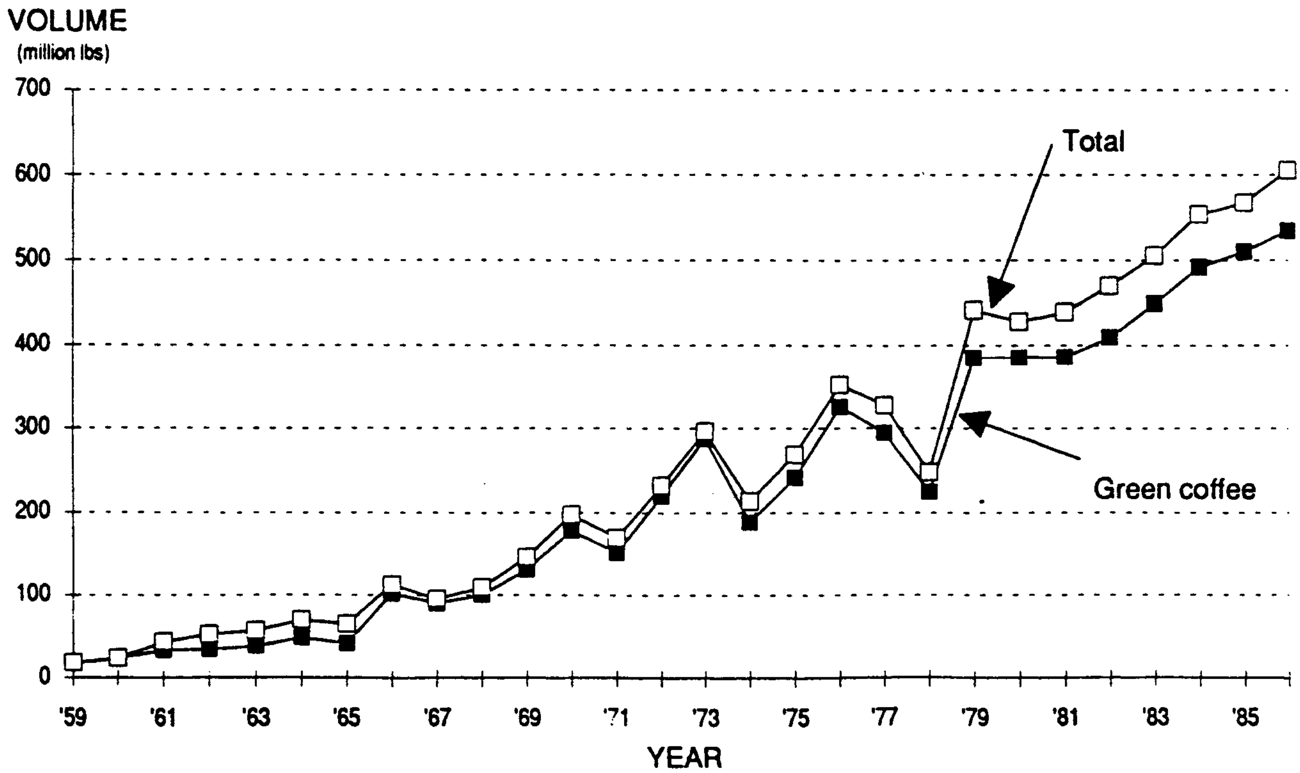


Figure 2. Coffee imports to Japan, 1959–1986.

Table 2. Green coffee imports into Japan, by major suppliers, 1983–1986.

----1983---- Supplier	Volume (million lb)	----1984---- Supplier	Volume (million lb)	----1985---- Supplier	Volume (million lb)	----1986---- Supplier	Volume (million lb)	----1987---- Supplier	Volume (million lb)
Brazil	138.3	Brazil	147.5	Brazil	165.6	Indonesia	109.1	Indonesia	136.5
Indonesia	67.8	Indonesia	85.2	Indonesia	96.2	Brazil	107.2	Brazil	124.1
Colombia	60.5	Colombia	62.1	Colombia	68.7	Colombia	88.4	Colombia	94.5
India	28.6	Honduras	32.5	Honduras	28.8	Honduras	42.2	Honduras	35.9
Ivory Coast	26.7	El Salvador	22.9	Peru	27.2	Peru	33.7	Peru	24.6
Honduras	23.2	India	21.3	Guatemala	19.1	Guatemala	19.0	Ethiopia	23.3
Jamaica	1.57	Jamaica	2.49	Jamaica	1.83	Jamaica	1.92	Jamaica	1.78
Yemen	0.66	Yemen	0.51	Yemen	0.71	Yemen	0.73	Yemen	0.66
USA	0.15	USA	0.18	USA	0.06	USA	0.09	USA	0.02
Other	102.4	Other	117.2	Other	101.6	Other	132.4	Other	154.4

Table 3. Reported prices of green coffee imports into Japan, by supplier.

	----1986----		----1985----		----1984----	
Top Five	USA	$4.86	USA	$4.18	USA	$3.93
	Bolivia	$4.44	Jamaica	$3.54	Jamaica	$3.19
	Venezuela	$4.35	Yemen	$2.22	Yemen	$2.15
	Jamaica	$4.04	Switzerland	$2.15	Cuba	$1.61
	Central African Rep.	$3.32	Cuba	$2.08	Kenya	$1.61
Selected	Brazil	$2.23	Brazil	$1.23	Brazil	$1.36
	Colombia	$2.05	Colombia	$1.43	Colombia	$1.46
	Honduras	$2.09	Honduras	$1.43	Honduras	$1.44
	Indonesia	$1.43	Indonesia	$1.18	Indonesia	$1.27
	Mean	$1.91	Mean	$1.33	Mean	$1.39

Note: Prices are in dollars per pound. Reported prices vary from computed prices in Table 2 for Bolivia and Venezuela.

accounted for 60 percent of the 15 million lb (actual product weight) imported in 1986. Ecuador and the United States together contributed 18 percent, or 2.9 million lb. Instant coffee from the United States was highest priced at an average of $9.24/lb, compared to $3.68/lb, $4.08/lb, and $4.60/lb for the other major supplying countries.

In terms of other coffee products, more than 75 percent of the 1.1 million lb of roasted coffee imported in 1986 came from the United States. Brazil consistently supplies more than 90 percent of the sweetened extract, and nearly 90 percent of the coffee extract without sugar.

The Tea and Coffee Trade Journal (1988) reported that 1987 imports of instant coffee declined from 1986 by 1.3 percent, to 14.8 million lb, while roasted beans and sugarless extract increased more than 2.5-fold, to 5.1 million lb and 10.7 million lb, respectively. No figures were reported for sweetened extract.

DISTRIBUTION CHANNELS IN JAPAN

As indicated above, imports of instant coffee into Japan have declined over time. However, consumption of both ground and instant coffee, as evidenced by domestic supply, has increased steadily (Table A3). The total supply of ground coffee in Japan has grown at an annual rate of 8.3 percent, and instant coffee has grown by 6 percent. Processing in Japan, therefore, accounts for practically all the net supply of ground coffee and about 85 percent of the net supply of instant coffee.

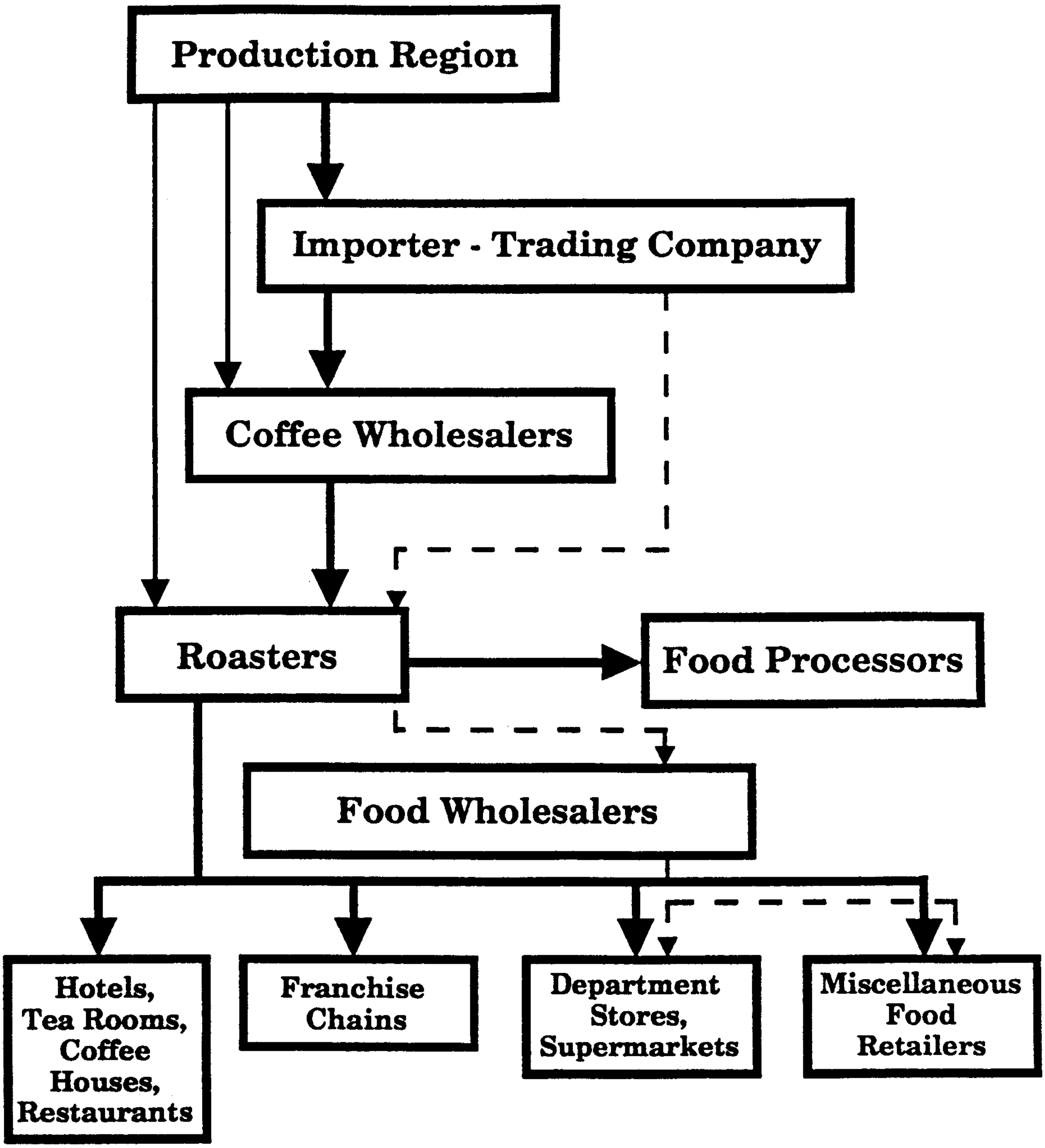


Figure 3. Distribution channels of coffee in Japan.

Most coffee is imported in green form. Domestic production of ground and instant then uses roughly proportionate shares of green coffee imports.[2] The per unit price of instant coffee is generally more than twice the price of ground coffee.

Figure 3 diagrams the primary, secondary, and tertiary channels of distribution for coffee in Japan. Orders typically are placed when prices are favorable (45 percent) or at a given inventory level independent of price, usually three months (40 percent) or 30 days (13 percent) before delivery. The major channel, accounting for 75 percent, is from the production region through an importer-trading company to a green coffee wholesaler, then to the roaster. Twenty-five percent of imports go directly to wholesalers or roasters.

There are three major roasters and 500 smaller firms engaged in roasting. Ueshima Coffee Co. and Kimura Coffee had a combined 59 percent of market share in 1986. Other roasters include Art Coffee and MJB Sales (Japan).

Instant coffee is dominated by three companies: Nestle (Japan), Ajinomoto/General Foods, and Suzuki Coffee. Market shares in 1986 were 67.8 percent for Nestle and 24.2 percent for Ajinomoto (Yano Keizai Kenkyujo 1987), versus respective shares of 73 percent and 18 percent in 1979 (Yano Economic Research 1981).

From the roaster, some coffee passes on to food processors, and food wholesalers handle some tertiary flows to retail firms. Four major categories are defined at the retail level: the institutional market, including hotels, restaurants, coffee houses, and tea rooms; franchise chains; department stores and supermarkets; and miscellaneous food retailers. The most frequently reported retail outlets for purchasing ground coffee are specialty coffee stores and "super-combis" (supermarkets), while the majority of instant coffee comes from only super-combis.

In 1985, there were about 170,000 coffee houses, or *kissaten*, in Japan (Karasawa 1988). In 1988, more than 50,000 coffee houses were reported in Tokyo alone, more than in any other city in the world. These are an integral component of city life. The *kissaten* is a surrogate office for business, and most customers do not just drink coffee. "They go to meet friends or lovers, to do business (many offer a wide range of modern business services), to talk politics, to listen to music, to eat (most serve light meals or snacks), to study, to relax, and for a variety of other reasons. Coffee drinking is only incidental." (Asia Pacific Agribusiness Report 1988a).

The popularity and sales of coffee houses are reportedly declining, however, with changes in distribution channels. The main competition is a trend toward consumption of coffee at home, as reflected in sales by supermarkets, neighborhood stores, and specialty coffee shops. *Kissaten* have evolved toward either fast-food-type operations[3] or gourmet outlets such as luxurious French cafes where customers can specify not only the type of coffee but also the roast and brewing methods (Faddis and Aldridge 1989). While 1988 *kissaten* prices were reported to have decreased dramatically to 120–150 yen/cup versus 350–400 yen/cup of a few years earlier (TCTJ 1988), the gourmet end commands prices in the neighborhood of 600 yen/cup (Graven 1989).

Canned coffee drinks (iced coffee) were introduced to Japan in the early seventies by Ueshima Coffee Co. The market has since been increasing at an average rate of more than 10 percent annually. Estimated consumption in 1984 was 123 million cases (Hikita 1985); in 1987, it was 200 million cases, or 1.5 billion liters (TCTJ 1988). The sales volume in 1988 was more than $3.5 billion. Ajinomoto has also introduced a self-heating canned coffee, in which a chemical reaction heats the product when a tab is pulled.

Canned coffee drinks are the best-selling drink on a year-round basis in Japan's two million vending machines, and a major determinant of market share is the number of vending machines. The makers of Coca-Cola (Georgia brand coffee) have about 33 percent of the market with 700,000 machines, and Ueshima Coffee Co. has about a 20 percent market share with fewer than 200,000 machines (Asia Pacific Agribusiness Report 1988b, TCTJ 1988). The four leading brands (Georgia, UCC, Daito, and Pokka) have a total market share of 70–75 percent (Hikita 1985). The 15–20 companies with canned coffee include major food companies such as Ajinomoto and beer brewers such as Kirin, Suntory, Sapporo, and Asahi (TCTJ 1988).

The household market for regular coffee is small but increasing. Sales in 1988 for home consumption were increasing at a 5–8 percent rate over 1987's, which in turn increased 8 percent from 1986 sales (TCTJ 1988). Because Japanese tea is a strong substitute and because coffee is re-

[2] The conversion rates, in terms of green coffee required for 1 lb of finished product are 1.19 lb for roasted (regular) coffee and 2.6 lb (up to 1983) and 3.0 lb (from 1983 on) for instant coffee. It was reported that 1.72 g of product is used for one cup (153 cc) of instant coffee and 7.14 g of grounds per 159 cc cup of regular coffee.

[3] Douter Coffee Company, with more than 200 outlets, pioneered fast food coffee in 1980 (Graven 1989). The company plans expansion into South Korea (Karasawa 1988).

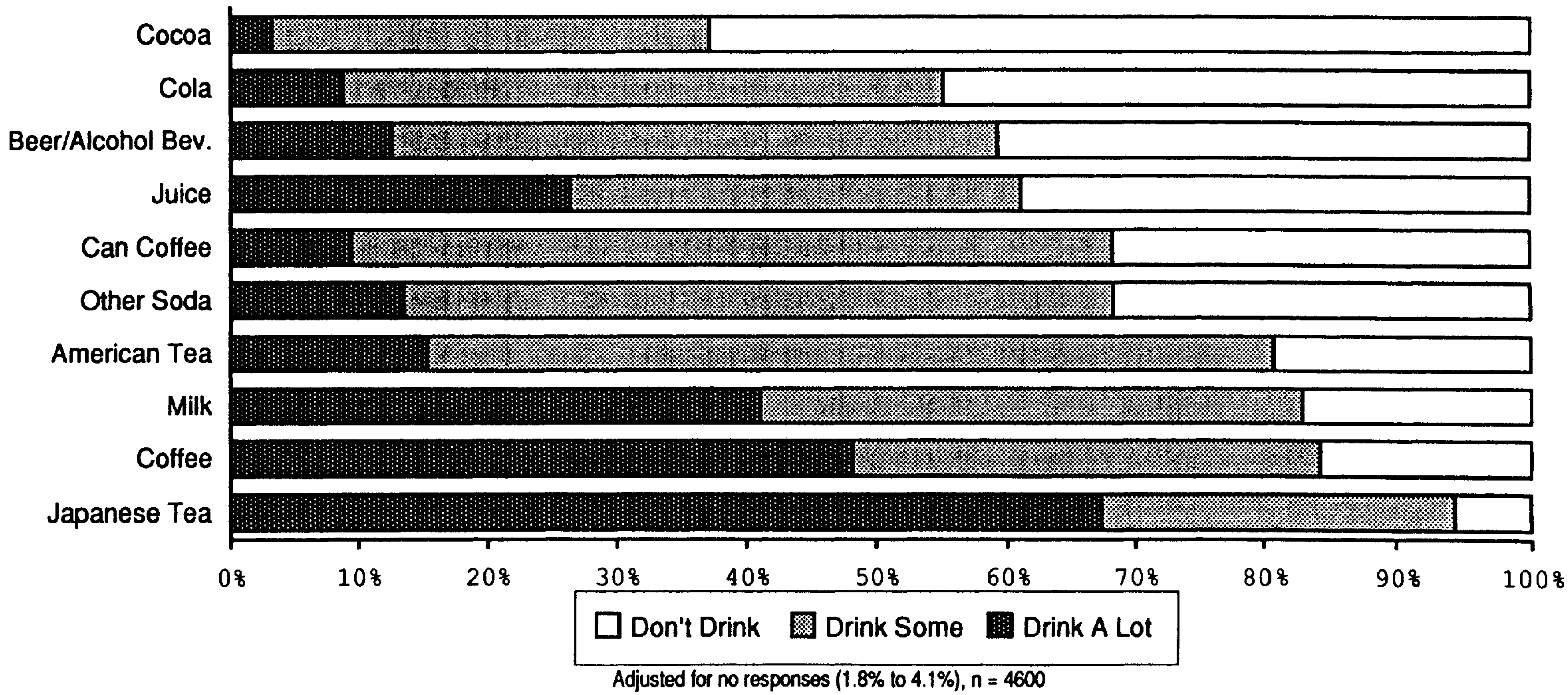


Figure 4. Relative consumption of different beverages in Japan, 1985.

garded as a Western drink, most consumers do not know how to brew coffee, so drink the instant product. Recent marketing efforts have concentrated on households, promoted coffee as a Japanese after-dinner beverage, and demonstrated brewing techniques.

The result has been not only more coffee consumed but increasingly more ground coffee being consumed in households as opposed to institutional and business locations. Home use of coffee is about 58 percent of all consumption. Consumption of ground coffee is shifting toward households, while relatively more instant coffee is being used in institutions and business.

CONSUMER PROFILE AND PERCEPTIONS

In Japan, the traditional and most popular beverage, in terms of percentage of population who drink it, is Japanese tea. This beverage was consumed by more than 92 percent of the populace in 1985 (Figure 4) versus 94 percent in 1980. Coffee is second in popularity (and may have surpassed tea as of this writing). Its reported consumption increased from 78 percent of consumers in 1980 to 83 percent in 1985. Further, coffee is rivaling tea as a social drink, especially among younger consumers and with regard to coffee houses. Milk, juice, sodas other than cola, and American tea are the next most popular beverages. Alcoholic beverages were not considered.

As reported by consumers, the most desirable characteristics of coffee, in decreasing order of importance, are gentle aroma, mild taste, weak flavor, mild bitterness, and good aftertaste. The four least mentioned characteristics are strong sour taste, lingering aftertaste, strong bitterness, and strong flavor.

The four reasons most often mentioned as to why consumers drink coffee are, by decreasing frequency of response, the condition (quality) of the coffee, taste or flavor, coffee's aroma in preparation, and to enhance enjoyment of conversation. All were static over time except for an increase in citing the condition of the coffee, presumably a reflection of a change from instant to ground coffee.

In terms of the different coffee products, regular or ground coffee is regarded as a luxury item (Figure 5).[4] This placement also suggests that coffee is regarded as a Western product. Instant coffee is perceived as more similar to other ordinary beverages. Both ground and instant coffee drinkers tend to be younger than tea drinkers. In 1984, the 18–39 age bracket drank more coffee than any other age group (TCTJ 1986). Nearly 80 percent of junior high school students drank coffee, versus 60–70 percent of the 60-and-over bracket.

The consumption of coffee products has also been increasing on a per capita basis (Table 4). Per capita consumption of instant, ground, and canned coffee increased between 1980 and 1985, with total consumption growing from seven to nine cups per week. The 1987 Ukers' International Tea and Coffee Buyers' guide estimates 1986 per capita annual consumption of coffee in Japan at 7.1 lb (2.23 kg). The proportion between products has remained relatively unchanged except for some shifts between ground and canned coffee. On a per capita basis, these figures indicate Japanese drink twice as much instant as ground coffee.

Overall, the majority of coffee is consumed at home, with 22 percent being consumed at the workplace or at school (Table 5). The breakdown is very different between products, however. Nearly all instant is consumed either at home or at the workplace or school, and in a 3:1 ratio. This ratio is similar for ground coffee, but as much is

Table 4. Consumption of coffee products over time in Japan.

Coffee Type	1980	1983	1985
	---------Cups/Week---------		
Instant	3.8	5.0	5.3
Regular	2.2	2.5	2.7
Can	0.6	1.0	1.0
Total	6.6	8.5	9.0

Table 5. 1985 Consumption of coffee products in Japan, by location.

Location	Inst.	Reg.	Can	Total*	(%)
	-------Cups/Week-------				
At home	3.9	1.1	0.2	5.2	58%
Coffee house	0.0	1.1	0.0	1.1	12%
Work/school	1.3	0.4	0.3	2.0	22%
Restaurant/ school	0.0	0.1	0.0	0.1	1%
Other	0.1	0.0	0.5	0.7	7%
Total	5.3	2.7	1.0	9.0	100%
(%)	59%	29%	11%	100%	

* Totals may not be exact, due to rounding.

[4] Consumers consider the price of coffee (instant and ground) to be "moderate," however (TCTJ 1986).

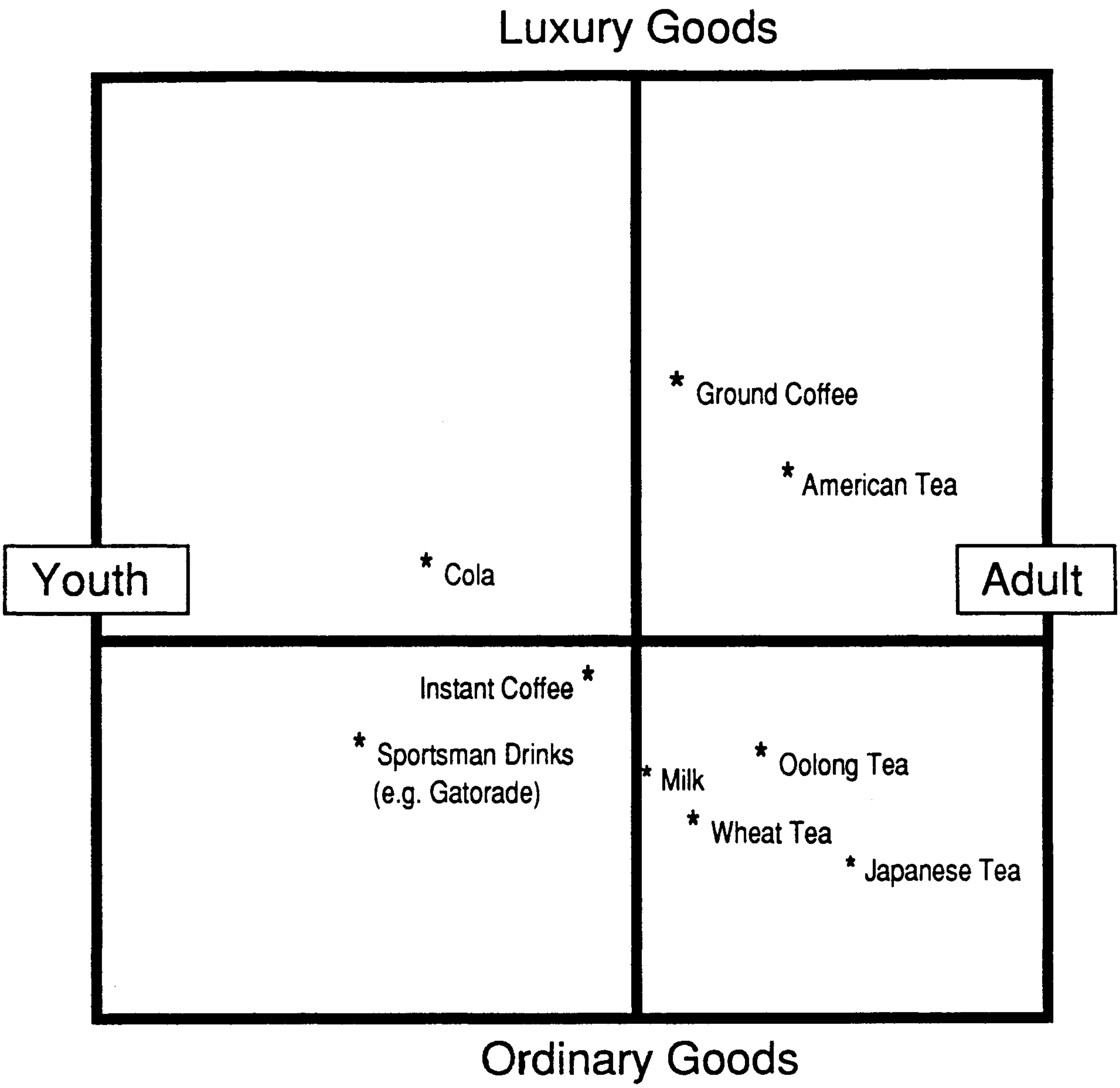


Figure 5. Consumer image of selected beverages in Japan.

consumed in coffee houses as at home. The consumption pattern for canned coffee is very different, with 20 percent being consumed at home, 30 percent at work or school, and half elsewhere.

SUMMARY

Japan is a large coffee market with potential for further growth. Unlike in the U.S. market, coffee consumption in Japan is still increasing. Over $1.1 billion of coffee and coffee products were imported in 1986, and imports have recently grown at an average 5–6 percent annual rate. Most roasting and other processing is done in-country, and most stages of the distribution channels are fairly concentrated. The level of market concentration suggests that a viable strategy for entry into the market would depend upon establishing a working relationship with an existing market participant.

As opposed to at work or at coffee houses, there is a trend towards more consumption at home as more consumers learn to brew coffee. The consumption of canned coffee drinks is also increasing, especially out of vending machines.

Japanese coffee drinkers tend to be younger than their American counterparts, and Japanese tea is the main competing product instead of soft drinks. Instant coffee is very popular, and the use of regular ground coffee is increasing. Japanese consumers also exhibit a preference for high quality and view ground coffee as a luxury. These observations suggest that the prospects in Japan for high quality coffee products are especially promising.

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APPENDIX

Coffee Imports and Domestic Supplies in Japan

Table A1. Green coffee imports into Japan, 1986.

Country	Volume (1000 lb)	Value[1] (x1000)	Computed Price[2] ($/lb)	Country	Volume (1000 lb)	Value[1] (x1000)	Computed Price[2] ($/lb)
Bolivia	240.8	$420	$1.75	Mexico	10,557.7	$20,267	$1.92
Brazil	107,192.5	$238,827	$2.23	Nicaragua	7,346.1	$12,876	$1.75
Burundi	841.8	$1,792	$2.13	Papua New Guinea	906.1	$1,857	$2.05
Cameroon	14,180.6	$21,391	$1.51	Peru	33,667.8	$64,632	$1.92
Central Afr. Rep.	41.7	$138	$3.32	Philippines	3,351.6	$4,973	$1.48
China	315.5	$517	$1.64	P. Yemen	363.6	$1,029	$2.83
Columbia	88,443.2	$181,631	$2.05	Rwanda	944.5	$1,451	$1.54
Costa Rica	2,934.3	$6,273	$2.14	Singapore	32.4	$45	$1.39
Cuba	3,440.8	$9,342	$2.72	Switzerland	1,930.7	$5,805	$3.01
Dominican Rep.	535.5	$1,149	$2.15	Tanzania	7,702.1	$17,203	$2.23
El Salvador	13,688.3	$27,343	$2.00	Thailand	874.6	$1,140	$1.30
Ecuador	608.9	$993	$1.63	Uganda	12,013.1	$18,125	$1.51
Ethiopia	15,332.5	$34,824	$2.27	United States	86.4	$419	$4.86
Guatemala	18,975.2	$41,362	$2.18	Venezuela	64.4	$106	$1.66
Haiti	1,121.6	$2,044	$1.82	Vietnam	552.1	$702	$1.27
Honduras	42,172.9	$88,123	$2.09	Yemen	372.7	$1,099	$2.95
India	8,581.2	$13,825	$1.61	Zaire	1,229.3	$2,181	$1.77
Indonesia	109,116.7	$155,600	$1.43	Zimbabwe	474.5	$967	$2.04
Ivory Coast	18,230.3	$27,240	$1.49				
Jamaica	1,917.9	$7,752	$4.04	Other	19.5	$25	$1.29
Kenya	697.0	$1,687	$2.42				
Madagascar	3,656.6	$5,701	$1.56	Total	534,755.1	$1,022,896	$1.91

[1] Conversion rate: US$1 = 168.52 yen.

[2] Certain computed prices do not correspond to reported figures in Table 3, notably for Bolivia and Venezuela.

Table A2. Coffee imports into Japan, 1960–1987.

Year	---- Green ---- Volume (1000 lb)	% Change	--- Instant[1] --- Volume (1000 lb)	% Change	---- Total[2] ---- Volume (1000 lb)	% Change
			----------- Green coffee equivalents -----------			
1959	17,920.0		304.3		18,361.0	
1960	23,608.9	31.7	185.2	–39.1	23,959.5	30.5
1961	33,238.2	40.8	10,021.7	5310.7	43,484.8	81.5
1962	33,829.1	1.8	18,158.2	81.2	52,163.7	20.0
1963	37,941.4	12.2	18,819.7	3.6	57,186.7	9.6
1964	48,097.7	26.8	20,956.3	11.4	69,219.4	21.0
1965	41,116.6	–14.5	23,231.9	10.9	64,461.0	-6.9
1966	101,727.7	147.4	10,716.3	–53.9	112,613.8	74.7
1967	89,794.2	–11.7	5,285.4	–50.7	95,269.2	–15.4
1968	99,882.1	11.2	9,631.4	82.2	109,725.2	15.2
1969	130,394.9	30.5	15,075.6	56.5	145,668.9	32.8
1970	177,493.7	36.1	19,646.6	30.3	197,250.5	35.4
1971	150,927.8	–15.0	17,721.6	–9.8	168,839.1	–14.4
1972	219,792.2	45.6	12,131.9	–31.5	232,287.9	37.6
1973	287,622.4	30.9	7,971.1	–34.3	296,184.4	27.5
1974	188,207.8	–34.6	24,773.2	210.8	213,510.2	–27.9
1975	241,246.9	28.2	27,174.4	9.7	269,060.7	26.0
1976	325,169.2	34.8	26,188.8	–3.6	351,907.0	30.8
1977	295,106.2	–9.2	32,499.5	24.1	327,923.2	–6.8
1978	223,942.0	–24.1	23,291.4	–28.3	247,747.2	–24.4
1979	385,220.1	72.0	55,394.0	137.8	441,646.1	78.3
1980	385,317.1	0.0	41,892.8	–24.4	428,793.1	–2.9
1981	385,972.0	0.2	44,882.8	7.1	439,723.3	2.5
1982	409,327.4	6.1	48,230.0	7.5	470,035.4	6.9
1983	449,846.5	9.9	41,065.9	–14.9	505,491.8	7.5
1984	491,898.0	9.3	42,201.5	2.8	554,008.5	9.6
1985	509,780.6	3.6	34,616.3	–18.0	567,273.7	2.4
1986	534,754.4	4.9	38,949.1	12.5	605,819.3	6.8
1987	595,879.2	11.4	38,434.0	–1.3	NA	NA

[1] Until 1982, 2.6 lb of green = 1.0 lb of instant; since 1983 this ratio has been 3:1. Some figures in the Tea & Coffee Trade Journal are inconsistent with the data presented here, implying the use of a different conversion factor for green coffee equivalents.

[2] Includes roasted beans and extract.

Note: NA = Not Available.

Table A3. Domestic supplies of regular and instant coffee in Japan.

REGULAR COFFEE

Year	Domestic Production (1000 lb)	Imports (1000 lb)	Exports (1000 lb)	Total Supply (1000 lb)	Value	Computed Price* ($/lb)
1977	101,430	185	0	101,615	$495,762	$4.88
1978	110,250	273	0	110,523	$550,223	$4.98
1979	132,300	364	0	132,664	$554,919	$4.18
1980	142,664	234	84	142,813	$619,780	$4.34
1981	145,089	542	415	145,217	$626,857	$4.32
1982	149,940	423	542	149,821	$581,002	$3.88
1983	164,052	412	494	163,970	$676,216	$4.12
1984	171,549	355	494	171,410	$710,256	$4.14
1985	191,615	439	256	191,798	$820,106	$4.28
1986	206,609	1,091	139	207,561	$1,393,390	$6.71

INSTANT COFFEE

Year	Domestic Production (1000 lb)	Imports (1000 lb)	Exports	Total Supply (1000 lb)	Value	Computed Price* ($/lb)
1977	43,454	10,833	0	54,287	$607,389	$11.19
1978	42,268	7,764	0	50,031	$704,728	$14.09
1979	59,352	18,465	0	77,817	$961,121	$12.35
1980	55,321	13,964	0	69,286	$780,850	$11.27
1981	58,371	14,961	0	73,332	$783,613	$10.69
1982	64,706	16,077	0	80,782	$776,574	$9.61
1983	66,302	15,794	0	82,097	$816,707	$9.95
1984	71,054	16,231	0	87,285	$867,813	$9.94
1985	72,776	13,314	0	86,090	$910,091	$10.57
1986	76,379	14,981	0	91,360	$1,366,568	$14.96

* Computed price = value/total supply.

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INFORMATION TEXT SERIES 037—7/90 (1M)